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FISHERIES OF PAKISTAN, 1972

Revised Edition

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International Activities Staff

WASHINGTON, D.C.

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PREFACE

The statistical information in this report was obtained from the Handbook of Fisheries Statistics of Pakistan, 1972, which was published by the Survey and Statistics Section of the Marine Fisheries Department of the Government of Pakistan.

In the compilation of these data it became apparent that discrepancies in statistics had occurred in several areas. Minor errors have been corrected without comment; however, in some instances, attention has been drawn to conflicting data in order to alert the reader. The alternative would have been to exclude the conflicting sections, but this would have denied the reader useful information concerning the fisheries of Pakistan.

REVISED EDITION: March 10, 1974

FISHERIES OF PAKISTAN, 1972

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FISHERIES OF PAKISTAN, 1972

William B. Folsom

SUMMARY

In 1972 Pakistan's 176,720 fishermen landed 212,519 metric tons (t) of fish; an increase of 26 percent over the 1971 catch of 169,304 t. The 1972 catch was comprised of 194,497 t of marine species and 18,022 t of freshwater species. The value of the 1972 catch---which has not been provided---is expected to be greater than the value of the 1971 catch, which the Food and Agriculture Organization (FAO) has estimated at US$73.6 million. Fishery exports for 1972 were reported as 35,255 t worth $18 million.

BACKGROUND

The Islamic Republic of Pakistan occupies an area of some 310,403 square miles---the area formerly known as West Pakistan. It is located on the Arabian Sea and is bordered by Iran on the west, Afghanistan on the north and northeast, and by India on the east.

Figure 1.--Map of Pakistan.

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Prior to 1971 the Islamic Republic of Pakistan consisted of two geographical units: East Pakistan and West Pakistan. These two regions were divided from each other by the breadth of India, a distance of about 1,000 miles. In early 1971, however, East Pakistan seceded from West Pakistan and established itself as the independent state of Bangladesh. This action removed the rich waters of the eastern province from the Pakistani fisheries. Figure 2 demonstrates the sudden drop in production that resulted.

Fishing along Pakistan's 550-mile coastline is divided into two areas: from the Indian border to Karachi (the Sind/Karachi Coasts) and from Karachi westwards to Gwater Bay, the border with Iran (the Mekran Coast). The Sind/Karachi coast is about 200 miles long and is characterized by a network of creeks. The coast is shallow and gradually slopes outwards about 60 miles. During the monsoon season the Indus River flushes organic matter into the ocean with a resulting bloom of plankton, which provides food for the marine resources in these waters. The Mekran Coast which extends westwards for some 350 miles consists primarily of large bays and backwaters. There are no perennial rivers flowing into the sea along this coast, but freshwater is dumped into the sea during the rainy season. The Continental Shelf in this region is 25 to 30 miles wide.

Freshwater fish production takes place in the Provinces of Karachi and Sind for the most part. There is also fishing in Punjab Province and in the North-West Frontier Province, although production in the latter is quite small.

CATCH

Until the late 1960's when political unrest began to affect production, West Pakistan's fishery catch grew slowly but steadily since Independence in 1947. Following the loss of East Pakistan the catch increased sharply. The catch of Pakistani (the former West Pakistan) has increased. The reasons for this increase are two-fold: First, about 70 percent of Pakistan's gill netters switched over to fishing for shrimp with a sharp increase in production. Second, the amount of "trash" fish caught in this operation increased by 63 percent. Figure 3 shows this growth, and table 1 provides statistical data on the Pakistani catch for 1971 and 1972.

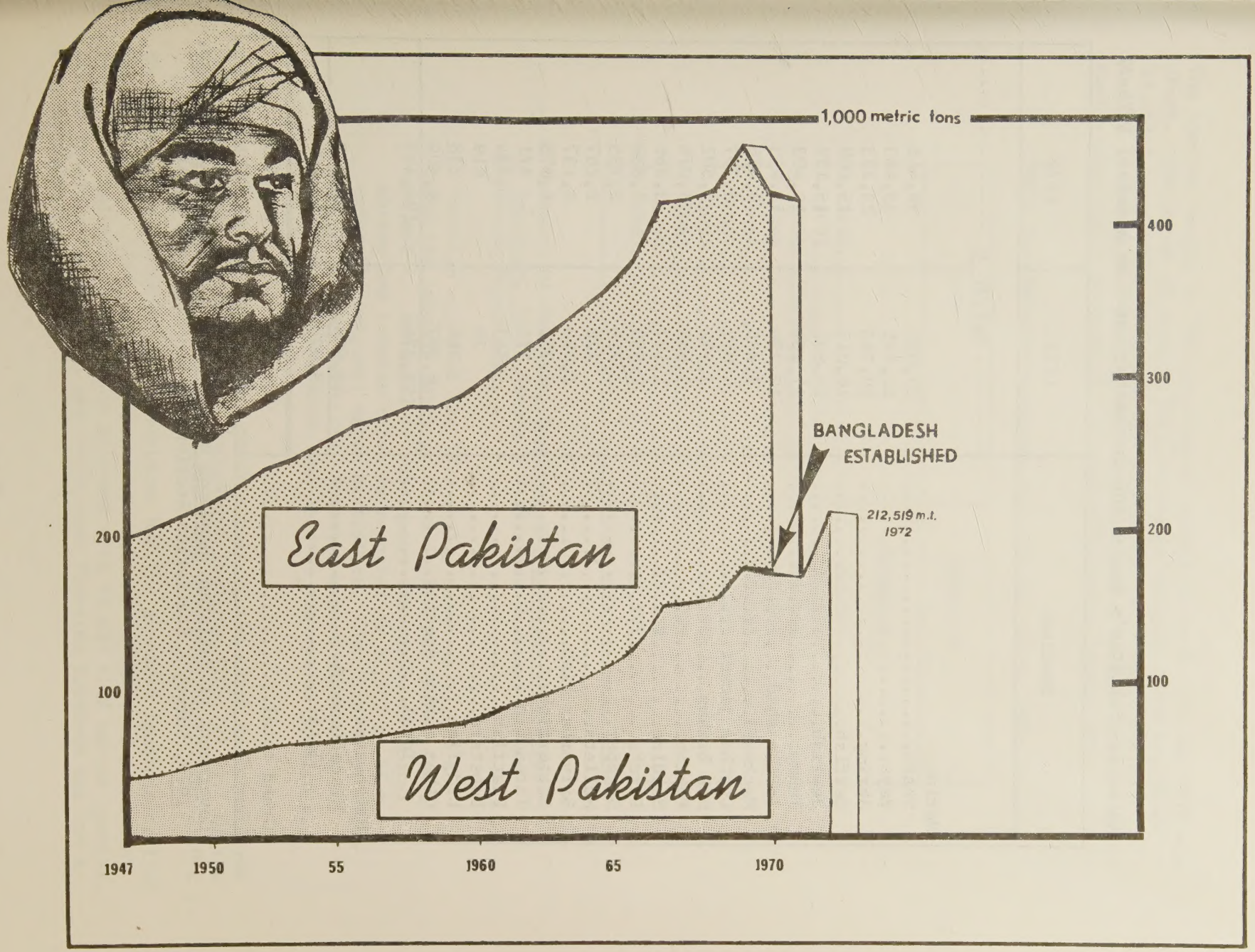

Figure 2.--Fishery catch of East and West Pakistan, 1947-72.

Table 1.--Pakistan's marine and freshwater catch by species, 1971-72

Species	1971	1972
	Metric t	
Marine:		
Shark	29,035	39,445
Rays	12,745	23,483
Shrimp	19,743	23,273
Catfish	16,015	15,609
Jewfish	14,801	15,179
Tunny	11,259	13,403
Indian shad	12,279	11,935
Mackerel	3,885	8,476
Leather jacket	6,089	6,707
Sea breams	3,942	5,502
Pomfret	3,684	5,076
Sardine	1,177	3,366
Perch	2,853	2,838
Snapper	2,715	2,735
Mullets	328	2,267
Silverbar fish	1,098	2,137
Butterfish	1,761	1,075
Threadfin	375	871
Flatfish	753	734
Lobsters	78	619
Ladyfish	364	258
Other marine species	6,297	9,509
Total	151,276	194,497
Freshwater:		
Miscellaneous	18,028	18,022
Total	18,028	18,022
Grand total	169,304	212,519

Government of Pakistan, Handbook of Fisheries Statistics of Pakistan, 1972, Survey & Statistics Section, Marine Fisheries Department.

The species caught in the greatest abundance in both 1971 and 1972 was shark. The catch of rays in 1972 increased sharply, from 12,745 to 23,483 t, replacing shrimp as the second most important species caught in Pakistan. Shrimp, however, remained a leading fishery product---especially because of its high world value (table 2).

Table 2.--Pakistan's shrimp and lobster catch, 1963-72

Year	Quantity
	Metric t
1972	23,867 1/
1971	19,821
1970	21,642
1969	20,667
1968	15,535
1967	17,232
1966	18,196
1965	18,025
1964	16,059
1963	9,171

Government of Pakistan, Handbook of Fisheries Statistics of Pakistan, 1972, Survey & Statistics Section, Marine Fisheries Department.

1/ Pakistan reported the 1972 shrimp catch as 23,273 t and the lobster catch as 619 t (table 1), which totals 23,892 t. However, in subsequent statistics the total shrimp and lobster catch is reported as 23,867 t--25 t under the original catch statistics. The figures provided for 1971 add correctly. Pakistan export statistics for 1972 list total shrimp and lobster exports as 5,042.6 t.

Of the total catch of 212,519 t roughly half of the catch was considered edible (103,795 t) and half was considered inedible (108,724 t). Of the edible catch, fish accounted for 82,753 t and shrimp accounted for 21,042 t.

By province, the Sind/Karachi provinces had the greatest landings of fish and shellfish. (148,676 t of marine species and 13,924 t of freshwater species). Baluchistan Province followed with 45,821 t of marine species. Punjab Province had 3,934 t, and North-west Frontier Province had 164 t of freshwater species.

UTILIZATION

In 1972 Pakistani citizens consumed 18,022 t of freshwater fishery products (the entire freshwater catch) and 28,899 t of marine products in a fresh or chilled form; this amounted to 22 percent of the entire catch leaving 78 percent of the catch for processing. In 1971 local consumption accounted for 29 percent of the total catch leaving 71 percent free for processing. Table 3 provides data on the disposition of the catch.

Table 3.--The disposition of the Pakistani catch, 1971-72

Commodity form	1972	1971
	---------Metric t.---------	
Reduction to fishmeal.....	106,735	64,019
Fresh or chilled.....	46,921	48,597
Cured.....	35,200	37,595
Frozen.....	15,207	12,846
Canned.....	6,467	3,741
Other.....	1,989	2,506
Total.....	212,519	169,304

Figure 3 shows utilization of Pakistan's fisheries catch in 1971 and 1972.

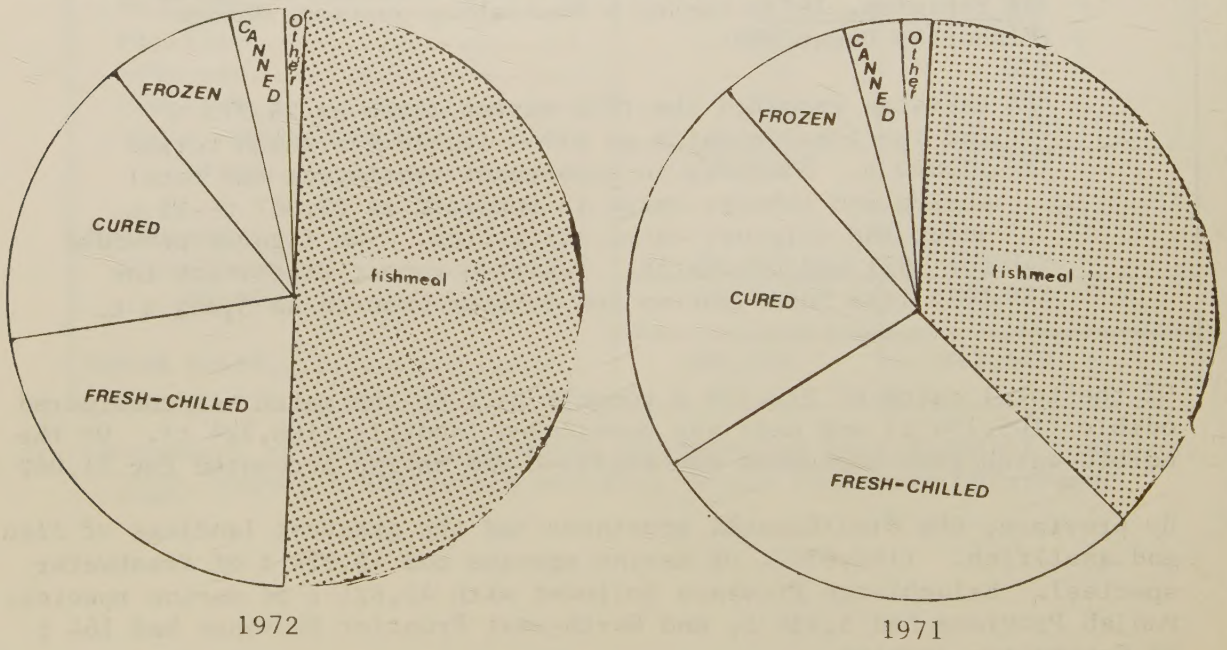

Figure 3.--Pakistan's catch utilization, 1971-72.

FLEET

In 1947 when Pakistan gained national independence the fishing fleet was composed entirely of sailing boats. By the end of 1972 1,411 powered vessels were registered with the Mercantile Marine Department of Pakistan. According to local estimates 866 powered fishing vessels were actually operating during the course of the year. This contrasts with 1,275 powered vessels---with 727 in actual operation---registered in 1971. This represents a 19-percent increase in the number of powered vessels actually operating.

The bulk of Pakistan's fishing fleet, however, remains unpowered. There were 11,434 unpowered vessels in 1972, and 10,405 in 1971. These unpowered vessel---mainly sailboats--- were divided between the marine fisheries (5,571 vessels) and the inland fisheries (5,863 vessels).

The marine fleet of powered vessels had 745 trawlers and 666 gill netters registered with Pakistani authorities; as indicated previously only 866 of these 1,411 vessels actually fished in 1971 (fig. 3).

FISHERMEN

The total number of fishermen earning their livelihood from fishing was 176,720 in 1972 and 163,998 in 1971. Out of the total number of active fishermen in 1972 the Pakistani Government estimates that 93,825 fishermen were engaged in marine fisheries and the remaining 82,895 fishermen were in the inland fisheries.

The increase in the number of fishermen is attributed to better employment opportunities and the increase in the number of fishing vessels.

Of the total number active in fisheries, 93,715 fishermen were classified as "full-time" fishermen, 58,070 were considered "part-time," and 24,935 were considered "occasional" fishermen. Of the full-time fishermen, 58,025 were in the marine fisheries and 35,690 were in the inland fisheries of Pakistan.

PROCESSING

In 1972 Pakistan between 20,430 t and 165,598 t of processed fishery products; the exact amount is not known. Table 3 shows that 46,921 t of fish were sold in a fresh or chilled form for local consumption, out of a total catch of 212,519 t. This left 165,598 t, which presumably was processed in one form or another.

Although information is not available for many of Pakistan's smaller fish processing facilities, it is known that the 39 largest fish processors in Pakistan produced an estimated 20,430 t of processed product worth $14.2 million.

The greatest amount processed was fishmeal which totaled 14,843 t and was valued at $1.3 million. By value the production of frozen seafoods was highly important.

Table 4 provides information on the fishery products produced in 1971-72 by Pakistan's 39 largest fish processing facilities.

Table 4. Pakistan's industrial fishery production by the 39 major fish processors, 1971-72.

Product	Quantity		Value 1/	
	1972	1971	1972	1971
	Metric t		US$1 million	
Fishmeal....	14,843	9,772	1.3	1.1
Frozen.....	4,201	3,700	10.0	9.4
Canned.....	1,386	970	2.9	2.2
Total...	20,430	14,442	14.2	12.7

1/ Value converted at Rs 4.79:US$1.00 for 1971 and Rs 11.03:US$1.00 for 1972.

In addition to the above-cited production figures, some fish oil was extracted for local consumption. Exact figures on the amount of this production was not provided.

Freezing plants:

Out of a total of 17 freezing plants in Pakistan, only 10 plants were operating in 1972. Many of the plants were operating well below their capacity; 70 to 80 percent of total plant capacity was not used for the production of fishery products. However, these plants were not completely idle as they were used to process meat and poultry. This situation, according to Pakistani authorities, was due to management problems and a shortage of raw materials---mainly shrimp---that slowed production.

Despite this setback, the production of frozen seafood products did increase, from 3,700 t in 1971 to 4,201 t in 1972---a 13.5-percent increase in quantity.

The five largest producers of frozen seafoods in 1972 were as follows: M/s. Seafood Freezers Ltd., M/s. Fishery Products Ltd., Pak Marine Products Ltd., G.M. Fisheries Ltd., and Pakistan Fisheries Ltd. (See appendix.)

Canning plants:

All of Pakistan's 10 canneries operated in 1972. All operated below capacity, because of the lack of small-sized shrimp that are normally exported. Exports, however, did increase; from 900 t in 1971 to 1,237 t in 1972. A.G. Fisheries Ltd., Jamal Fisheries Ltd., G.M. Fisheries Ltd., Indus Canning Co., and Marine Food Industries Ltd., were the five largest canners in 1972.

Fishmeal plants:

Pakistan has 10 fishmeal plants, but only 9 operated in 1972. Production of fishmeal was for domestic consumption and for export. Fishmeal production for export reportedly increased from 8,724 t in 1971 to 13,253 t in 1972. The largest producer of fishmeal was the Shirmyn Seafoods Company.

Other processors:

Although information was not provided, it is apparent that other firms processed fish---in other forms---for home consumption and for export. Export statistics list considerable exports of dried or salted fish products, dried shrimp exports, fish-maw exports, shark fin exports, and "other" types of fish preparations.

EXPORTS

According to the Survey and Statistics Section, Marine Fisheries Department of the Government of Pakistan, exports of fishery products were 35,255 t in 1972. This amount represents a 23-percent increase over the 1971 export figure of 28,447 tons. In terms of value, exports were worth $18.2 million in 1972 and $17.6 million in 1971.

In May 1972, the Pakistan Rupee was devalued from Rs 4.79:US$1.00 to Rs 11.03:US$1.00. This devaluation had a major effect on the Pakistani balance of payments. By Pakistani standards the value of their exports increased by 138 percent over 1971 exports, but by international monetary standards the increase was only 3 percent.

Among fish products the greatest exports by volume consisted of dried or salted fish. Sri Lanka and Hong Kong were the leading customers for these products. Fishmeal, which went mainly to West Germany, was the second largest commodity exported in 1972. Frozen fish products (mainly to the United Kingdom), fish maws (to Hong Kong), shark fins (to Singapore), and other fish products (to the United States) constituted the export items shipped in 1972.

Frozen shrimp was a leading commodity---especially in terms of value--- in 1972. Japan got the largest share of Pakistan's shipments of frozen shrimp; the United States came second, but considerably below the Japanese imports. The United States, however, did import the bulk of Pakistan's frozen lobsters. Canned shrimp was also an important item; the United Kingdom and France were the leading customers for these canned products in 1972. Hong Kong and Kuwait were the leading importers of dried shrimp in 1972.

Tables 5 and 6 provide statistical information on Pakistan's fish and shellfish exports, by quantity and by country, in 1972.

RECENT DEVELOPMENTS

On March 14, 1973, the chairman of the Karachi fishermen's cooperative society reported that 400 Pakistani trawlers had been idled along with 6,000 to 8,000 fishermen because of fishing operations by a Soviet fleet in the Arabian Sea. The chairman stated that the Soviet fleet---which reportedly included 7 trawlers, a mothership, and a freezer vessel--- had begun fishing off the Mekran coast in October 1972 and were catching tremendous quantities of fish and shellfish before these resources could reach the Pakistani coastal waters.

On March 21, 1973, Pakistani President Zulfikar Ali Bhutto announced that Pakistan would extend its exclusive fishery zone from 12[2/] to 50 miles from the coast. The decision was taken to protect stocks of fish and shellfish in Pakistani waters and to protect Pakistani fishermen.

2/ The 12-mile limit was originally established on February 19, 1966.

Table 5.--Pakistan's exports of fishery products, by quantity, 1971-72

Commodity	1972	1971
	Metric t	
Fish:		
Fresh or chilled	-	.5
Frozen	84.5	48.5
Smoked	-	5.3
Dried or salted	16,714.5	14,816.7
Total	16,799.0	14,871.0
Other:		
Fishmeal	13,253.1	8,724.6
Shark fins	71.2	99.6
Fish-maws	63.3	49.4
Other preparations	25.4	288.5
Total	13,413.0	9,162.1
Total fish	30,212.0	24,033.1
Shellfish:		
Fresh or chilled:		
Crabs	-	36.6
Total	-	36.6
Frozen:		
Shrimp	3,569.8	3,303.6
Lobster	96.3	9.1
Total	3,666.1	3,312.7
Canned:		
Shrimp	1,237.3	899.5
Lobster	-	.7
Total	1,237.3	900.2
Dried:		
Shrimp	139.2	164.5
Total	139.2	164.5
Total shellfish	5,042.6	4,414.0
Grand total	35,254.6	28,447.1

Source: Government of Pakistan, Handbook of Fisheries Statistics of Pakistan, 1972, Survey & Statistics Section, Marine Fisheries Department.

Table 6.--Pakistan's fishery exports, by quantity and country, 1972

Product / Country	Quantity
	----------Metric t----------
FISH:	
Frozen:	
United Kingdom	50.2
Japan	16.0
Holland	12.7
Hong Kong	2.9
United States	1.1
Afghanistan	.7
Dubai	.4
Iran	.1
Total	84.1
Dried or salted:	
Sri Lanka	12,920.6
Hong Kong	3,284.1
Iran	318.3
Singapore	120.2
Netherlands	38.5
United States	11.5
Burma	8.8
United Kingdom	8.2
Dubai	3.9
Other	.1
Total	16,714.2
Fishmeal:	
West Germany	11,029.2
Iran	2,018.5
Singapore	137.4
United Kingdom	68.0
Total	13,253.1
Shark fins:	
Singapore	61.0
Hong Kong	10.1
Thailand	-
Total	71.1

Note: Totals have been rounded and in certain instances do not correspond to figures provided in Table 5.

Continued---

Table 6.--Pakistan's fishery exports, by quantity and country, 1972--continue

Product / Country	Quantity
	----------Metric t----------
FISH:	
Fish maws:	
Hong Kong	26.4
United States	18.1
Singapore	14.4
United Kingdom	4.3
Total	63.2
Fish preparations, nes:	
United States	25.3
Dubai	.1
Total	25.4
Total fish exports	30,211.1
SHELLFISH:	
Frozen:	
Shrimp:	
Japan	2,575.6
United States	820.8
United Kingdom	143.7
Holland	18.0
France	9.3
Iran	.8
Afghanistan	.6
Dubai	.5
Total	3,569.3
Lobster:	
United States	95.6
Iran	.6
Afghanistan	.1
Total	96.3
Total frozen shellfish	3,665.6

Continued---

Table 6.--Pakistan's fishery exports, by quantity and country, 1972---continued.

Product / Country	Quantity
	Metric t
SHELLFISH--continued:	
Canned:	
Shrimp:	
United Kingdom	563.9
France	355.0
Holland	77.7
Australia	71.1
West Germany	63.7
United States	27.3
Bulgaria	13.6
Belgium	11.4
New Zealand	11.2
Italy	8.5
Sweden	6.1
Other	27.3
Total	1,236.8
Dried:	
Shrimp:	
Hong Kong	55.3
Kuwait	52.3
Japan	7.2
France	6.3
Mauritius	6.2
Lesotho	3.8
Kenya	2.3
Bahrain	3.3
Botswana	1.0
Sierra Leone	.6
Dubai	.4
Saudi Arabia	.4
United Kingdom	.3
Oman	.2
Total	138.6
Total shellfish	5,041.0
Grand total	35,252.1

Source: Government of Pakistan, Handbook of Fisheries Statistics of Pakistan, 1972, Survey & Statistics Section, Marine Fisheries Department.

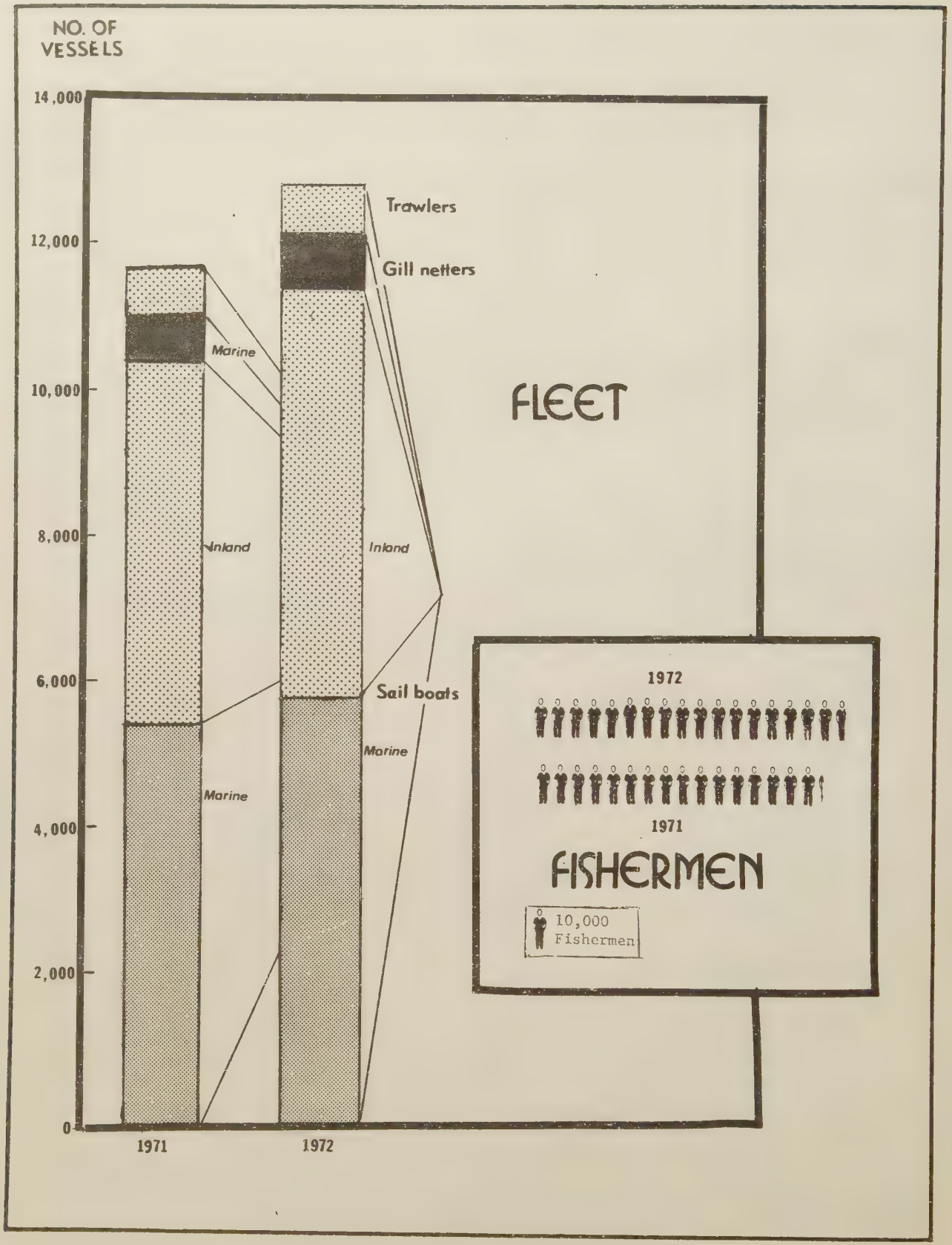

Figure 4.--Pakistan's fishing fleet and fishermen, 1971-72.

LISTING OF PAKISTANI FISH PROCESSORS AND SHRIMP EXPORTERS.

Name and address	Type of facility	Shrimp exports to U.S.A.
M/s. A.G. Fisheries Ltd. Plot No. B-5 Fish Harbour, West Wharf Karachi-2	Canning	yes
M/s. Associated Fisheries Ltd. Ibrahim Hydri Village Korangi Creek Karachi-20	Freezing	unk
M/s. Ata Maqbool Industries Ltd. S.I.T.E. Manghopir Road Karachi-16	Freezing	unk
M/s. Fishery Products Ltd. Plot No. C-1 and C-2 Fish Harbour, West Wharf Karachi-2	Freezing	unk
M/s. Frigid Fish Ltd. Plot No. C-6 Fish Harbour, West Wharf Karachi-2	Freezing	unk
M/s. G.M. Fisheries Ltd. Plot No. B-1 Fish Harbour, West Wharf Karachi-2	Freezing & Canning	yes
M/s. H. Ghulam Hohd & Brothers Ltd. Plot No. F-81 S.I.T.E. Manghopir Road Karachi-16	Freezing	yes
M/s. H.M. Fishing Industries Ltd. Plot No. 9, 10, & 11. Deh Ibrahim Hydri Village Korangi Creek Karachi-20	Fishmeal	no

The National Marine Fisheries Service, NOAA, U.S. Department of Commerce assumes no responsibility in supplying this list or for including or excluding the name of any firm or firms from this list. Information on firms shown as exporting shrimp to the United States has been obtained from previous listings. Other firms may be exporting shrimp to the United States; these have been listed as "unk" (unknown).

Listing of Pakistani fish processors and shrimp exporters---continued:

M/s. H.M. Ghulam Hussain B/81-82 Deh Ibrahim Hydri Village Korangi Creek Karachi-20	Fishmeal	no
M/s. Hood Bhoy Fishmeal & Bone Works Al-Yousuf Chambers, 3rd Floor, No.21 Saharh-e-Liaqat Karachi-1	Fishmeal	no
M/s. Indus Canning Co. Plot No. F-23 S.I.T.E. Maripur Road Karachi-16	Canning	yes
M/s. International Fisheries (Pak) Ltd. Glaxo Laboratories, West Wharf, Karachi-2	Freezing	unk
M/s. Jamal Fisheries Ltd. Plot No. B-3 Fish Harbour, West Wharf Karachi-2	Canning	yes
M/s. Karachi Fisheries Deh Ibrahim Hydri Village Korangi Creek Karachi-20	Fishmeal	no
M/s. M.A. Mohammadi & Co. Pak Chambers 7 Wharf Road Karachi-2	Fishmeal	no
M/s. Marine Food Industries Ltd. Manduiwala Yousuf Building Altaf Hussain Road Karachi-2	Canning	unk
M/s. Mekran Fisheries Ltd. Plot No. B-2 and B-4 Fish Harbour, West Wharf Karachi-2	Freezing & canning	yes

Continued---

Listing of Pakistani fish processors and shrimp exporters---continued:

M/s. Naeem Trading Corporation 17-A, Pak Chambers 25 West Wharf Karachi-2	Fishmeal	no
M/s. National Refrigeration Jaffer Chambers 28 Abdullah Haroon Road Karachi-3	Freezing	unk
M/s. Orient Produce Export Syndicate 6-8 Yousuf Ali Bhoy Building Alba Hussain Road Karachi-2	Fishmeal	no
M/s. Pak Marine Products Ltd. Plot No. D-3 Fish Harbour, West Wharf Karachi-2	Freezing	unk
M/s. Pakistan Fisheries Ltd. Plot No. A-4 Fish Harbour, West Wharf Karachi-2	Freezing & Canning	yes
M/s. Pakistan Vitamin Products Ltd. Plot No. D-1 Fish Harbour, West Wharf Karachi-2	Oil extraction	no
M/s. Pak Primco Ltd. B/20 Deh Ibrahim Hydri Village Korangi Creek Karachi-20	Fishmeal	no
M/s. Public Industries Ltd. Bank House, No.2, 5th Floor Habib Square, M.A. Jinnah Road Karachi-2	Fishmeal	no

Continued---

Listing of Pakistani fish processors and shrimp exporters---continued:

M/s. Riaz-o-Khalid (Fisheries) Ltd. Plot No. C-5 Fish Harbour, West Wharf Karachi-2	Freezing	unk
M/s. Sardinia Sea Foods 24 KMC Machi Miani Market 1st Floor, Kharadar Karachi-2	Fishmeal	no
M/s. Seafood Freezers Ltd. Plot No. A-2 Fish Harbour, West Wharf Karachi-2	Freezing & Canning	yes
M/s. Shahsons Fisheries Ltd. Plot No. D-6 Fish Harbour, West Wharf Karachi-2	Freezing	yes
M/s. Shikoh Fishery Products Ltd. Plot No. C-3 Fish Harbour, West Wharf Karachi-2	Freezing	unk
M/s. Sunrise Trading Co. Eastate Avenue S.I.T.E. Manghopir Road Karachi-16	Canning	unk
M/s. Union Cold Storage & Co. Ltd. Abdul Hayee Chambers Dockyard Road, West Wharf Karachi-2	Freezing & Canning	yes
M/s. William Sons & Co. Ltd. Plot No. D-7 Fish Harbour, West Wharf Karachi-2	Dehydration	no

Figure 5.--Pakistani fishermen relaxing aboard their sailboats after unloading their morning catch.

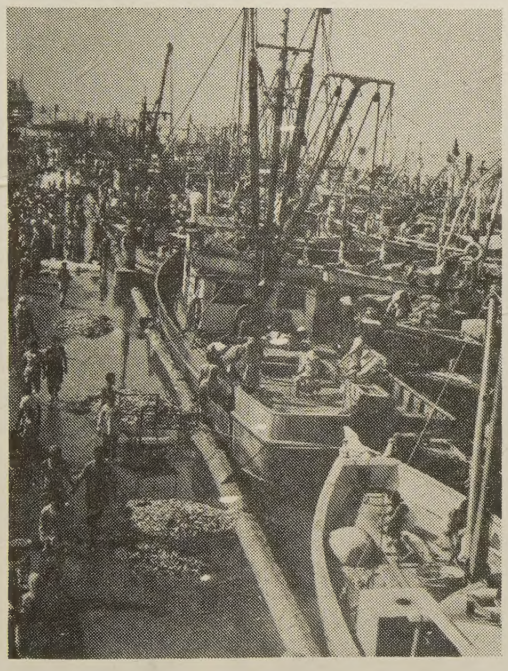

Figure 6.--An early morning scene at the Karachi Fish Harbor.

Figure 7.--Fish being unloaded at the Karachi Fish Harbor.

Photographs provided by Mr. M.I. Butt, Minister (Information), Embassy of Pakistan, Washington, D.C.

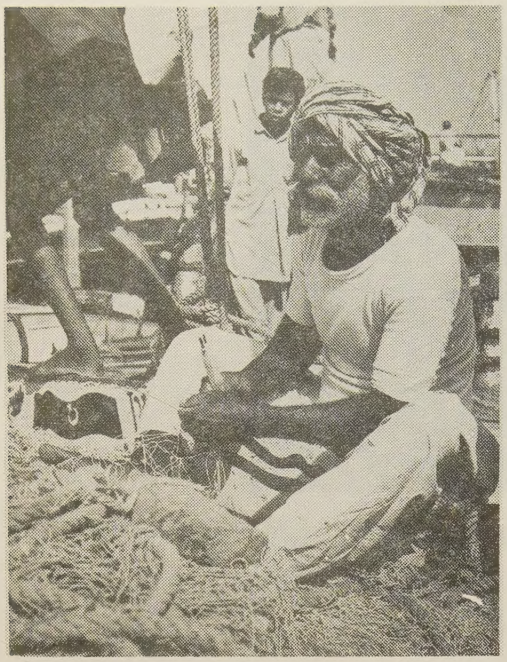

Figure 8.--A Pakistani fisherman repairs his net.

Figure 9.--Weighing of salted and dried fish.

Figure 10.--Shrimp being washed and peeled.

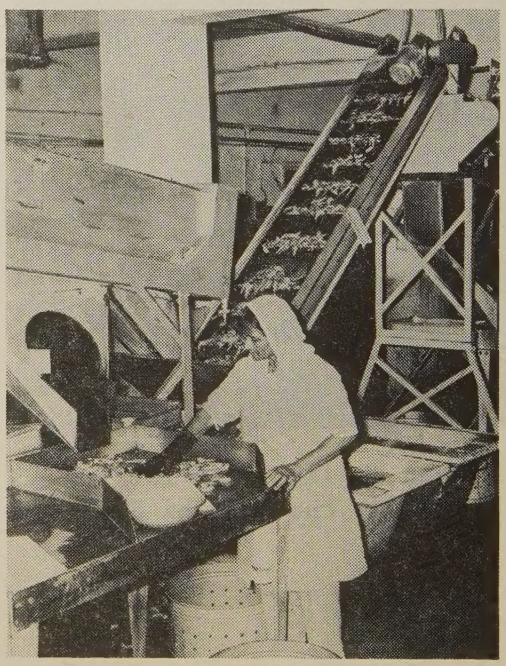

Figure 11.--A shrimp processing plant in operation.